EBU
OPERATING EUROVISION AND EURORADIO

AUDIENCE TRENDS
RADIO 2015

MEDIA INTELLIGENCE SERVICE
OCTOBER 2015

METHODOLOGY

- Data sources for this report is provided by EBU Members through the Media Intelligence Survey and the GEAR network.
- Year on year evolutions are only based on countries with comparable figures. All those with methodological differences have been excluded.
- Youth age group refers to 15-24 year olds, though some market definitions vary.

AUDIENCE DATA DEFINITIONS

AGGREGATED DATA

Daily Listening Time (HH:MM)
The average number of minutes of radio that each individual listened per day

→ Daily listening times across markets are averaged to give the **average daily listening time**

Weekly Reach (000s / %)
Everyone that listened for at least 15 consecutive minutes in an average week, though in some markets definitions vary. Expressed as the total amount of people or as a % of the population

→ Reach in 000s across markets are added together to give the **total reach in 000s**

Reach % across markets are averaged to give the **average reach in %**

Market Share (%)
% of listening based on the total radio-listening audience

→ Market shares across markets are averaged to give the **average market share**

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CONTENT

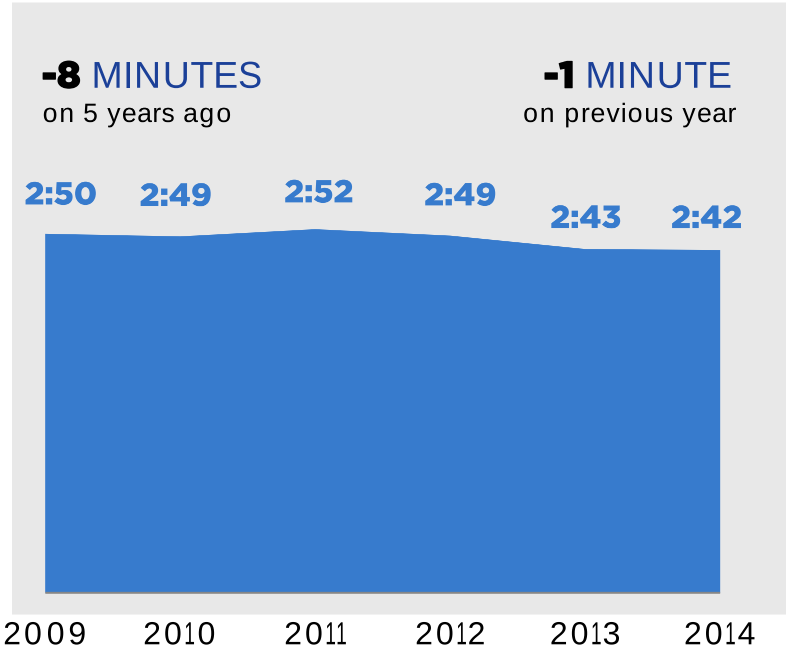
SECTION 1

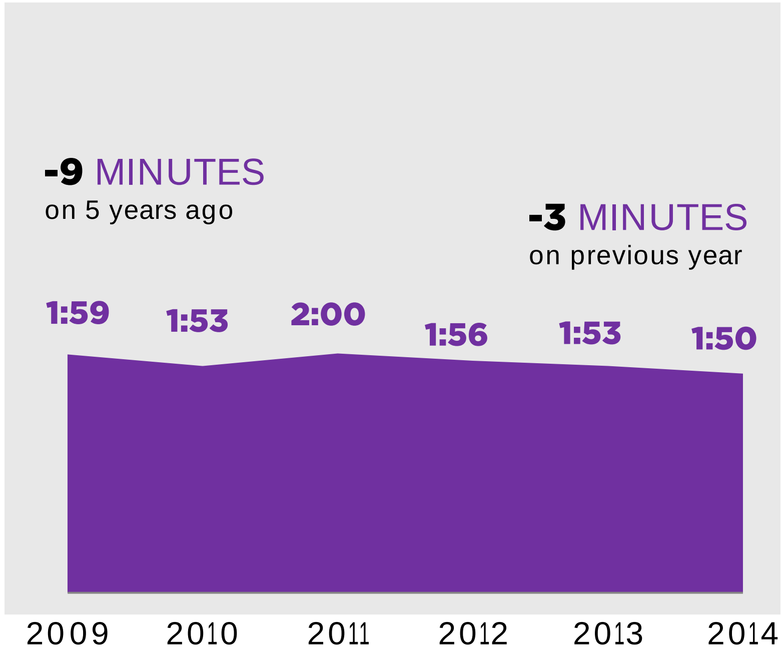
LISTENING TIME

2014 RADIO LISTENING TIME

EUROPEAN CITIZENS
in 2014 listened to on average
2:42 OF RADIO DAILY

EUROPEAN YOUTH
in 2014 listened to on average
1:50 OF RADIO DAILY





Stable listening time overall, however declines among youth persist in the majority of markets

Source: EBU based on Members' data. Note: 2014 average based on 26 EBU markets (23 for youth). Number of markets may vary by year.

All Youth

2014 daily listening time (in H:MM)

( ) Difference on previous year (in minutes)

HEAVY RADIO LISTENERS

RUSSIAN FEDERATION

4:14 (-3)

n.a.

HUNGARY

3:56 (+8)

3:31 (+18)

ESTONIA

3:44 (-2)

2:24 (+5)

LIGHT RADIO LISTENERS

SWITZERLAND

1:40 (-4)

0:50 (-2)

NORWAY

1:30 (=)

0:59 (+1)

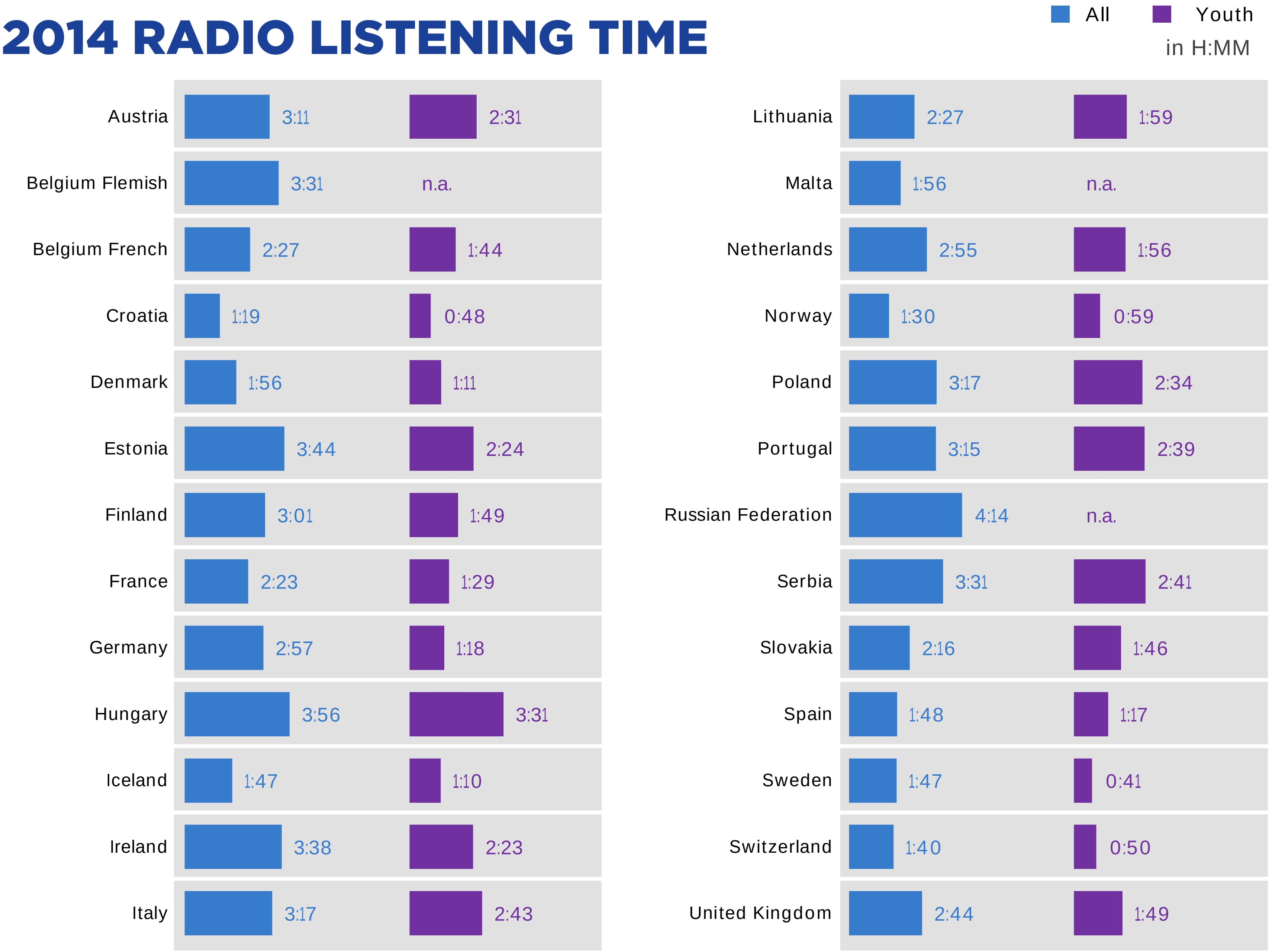
CROATIA

1:19 (-2)

0:48 (-4)

Source: EBU based on Members' data.

2014 RADIO LISTENING TIME

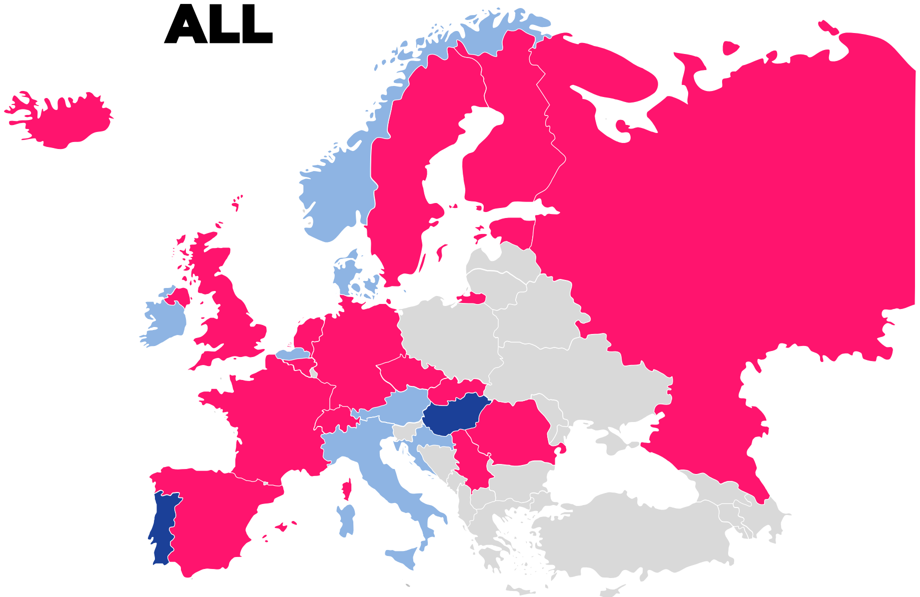


Source: EBU based on Members' data.

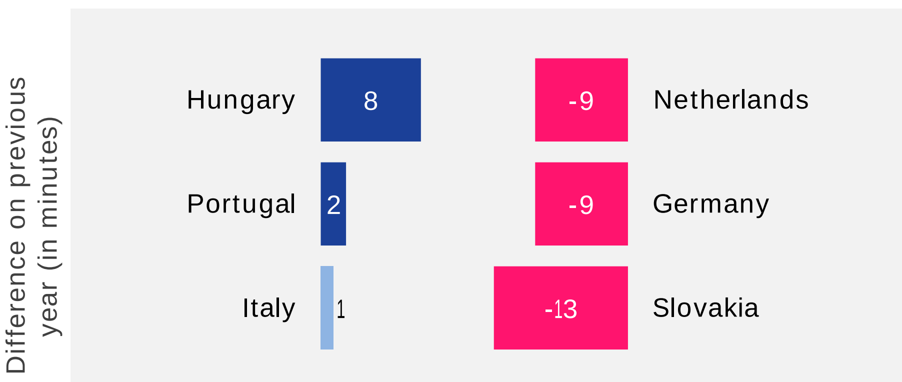
2014 RADIO LISTENING TIME

Increase vs 2013
Level with 2013*
Decrease vs 2013
No evolution data

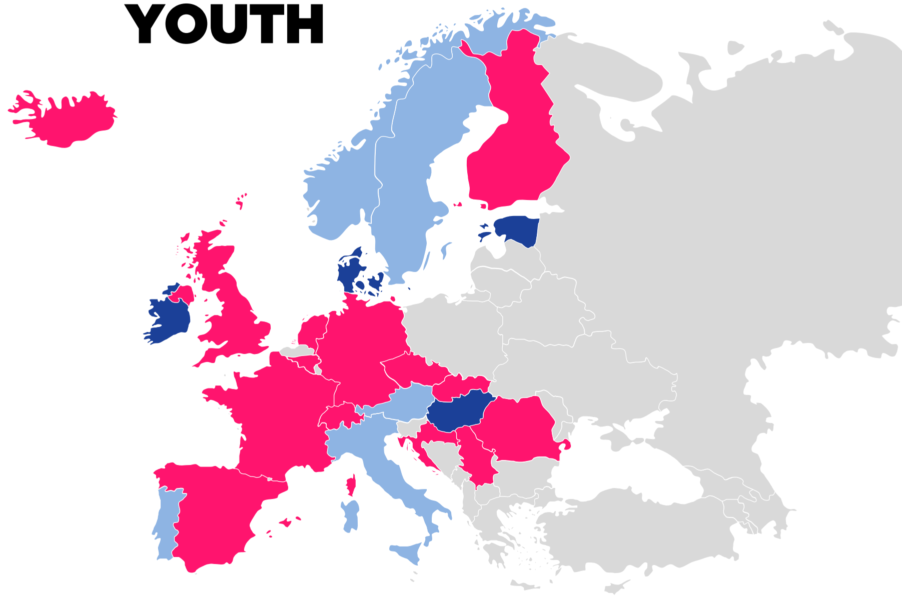
ALL



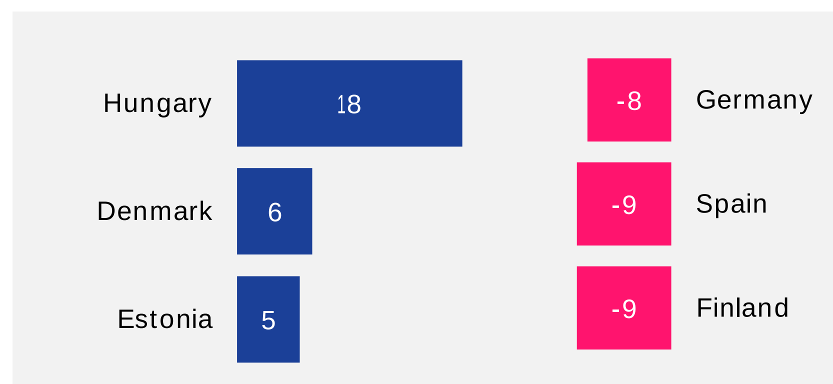
68% of markets saw a **DECREASE** of listening time in 2014



YOUTH



64% of markets saw a **DECREASE** of listening time among youth in 2014



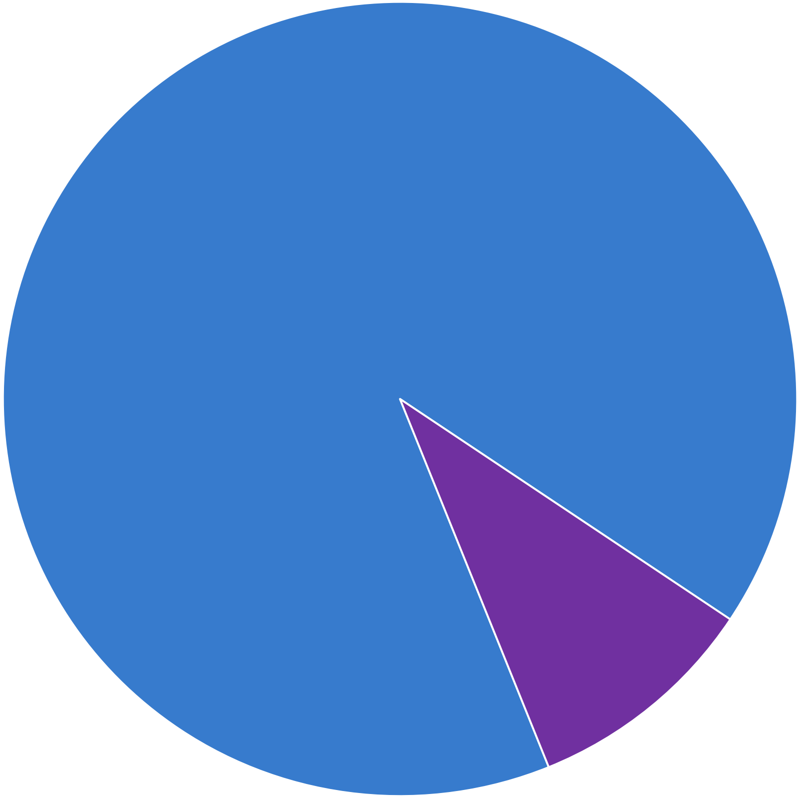
Source: EBU based on Members' data. *Level with 2013 includes evolutions between -1 and +1 minute

SECTION 2
REACH

RADIO WEEKLY REACH IN 2014

420

MILLION LISTENERS
reached weekly



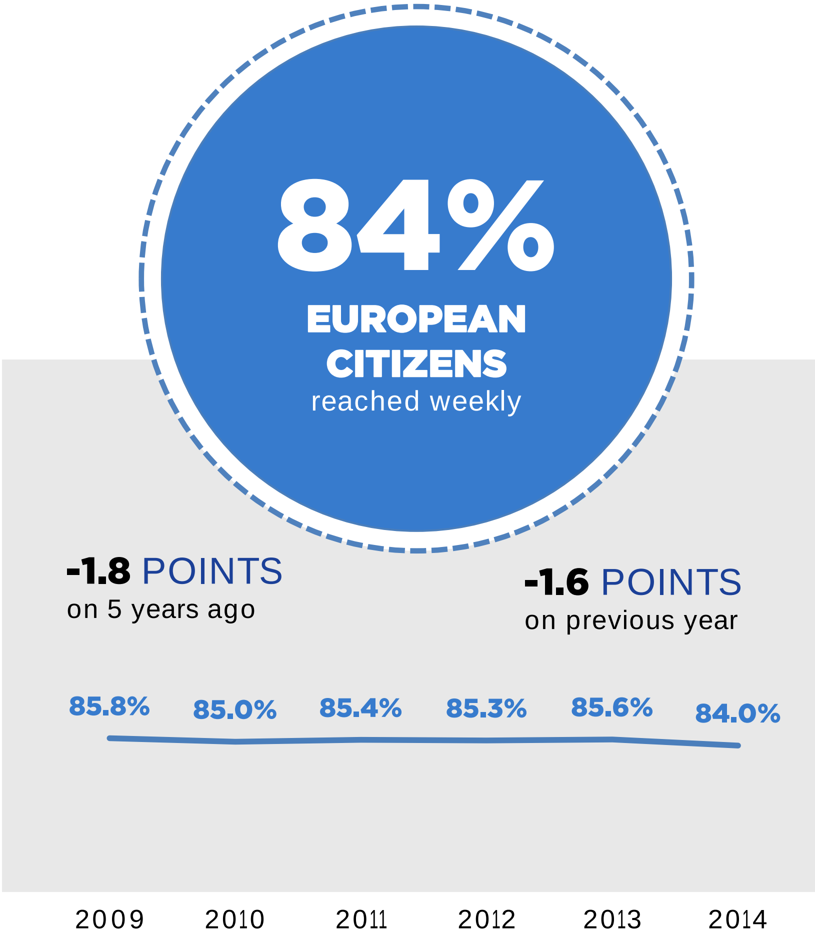
including

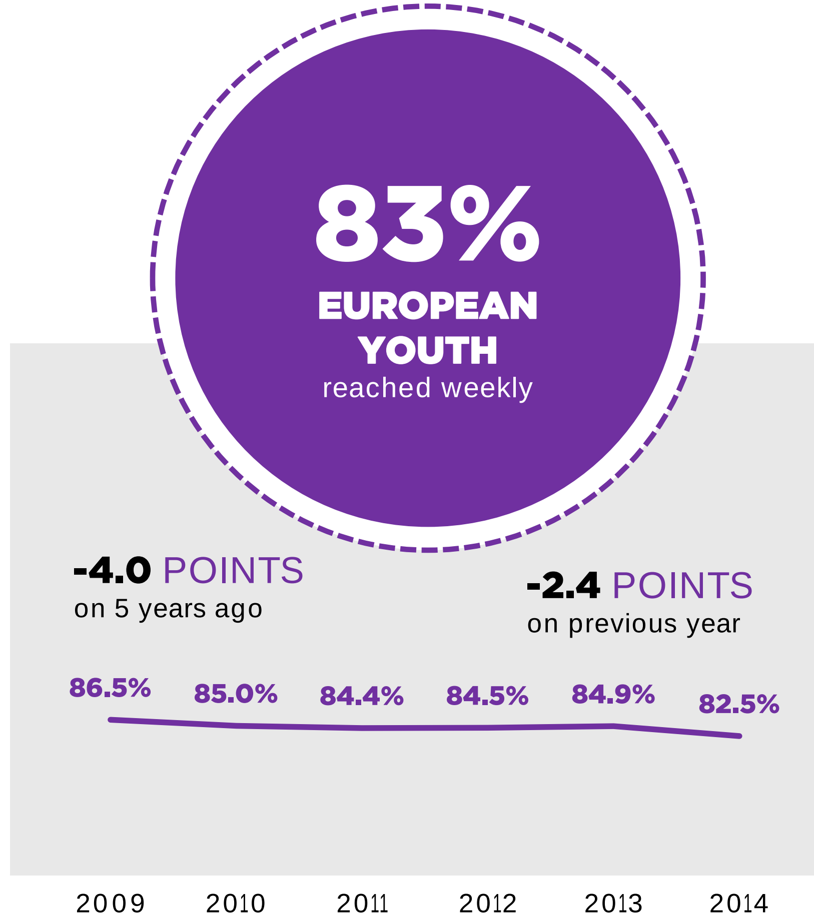
40

MILLION YOUNG LISTENERS
reached weekly

Source: EBU based on Members' data. Note: data based in 30 markets (24 for youth).

RADIO WEEKLY REACH IN 2014





Slight decline of weekly reach, more acute among youth

Source: EBU based on Members' data. 2014 average based on 29 EBU markets (28 for youth). Number of markets may vary by year.

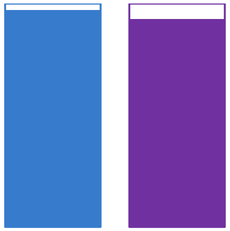
All ■ Youth ■

2014 weekly reach (in %)

( ) Difference on previous year (in points)

HIGH RADIO REACH

ESTONIA



97.0% 93.0%

(+1.0) (+1.0)

AUSTRIA



94.9% 92.9%

(-0.2) (-1.5)

FINLAND

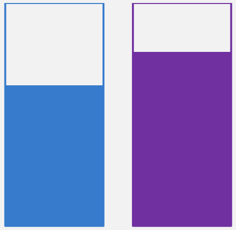


94.0% 90.0%

(=) (-3.0)

LOW RADIO REACH

SERBIA



63.1% 78.0%

(-0.7) (+2.0)

SPAIN



61.0% 60.1%

(-0.5) (-4.6)

MALTA

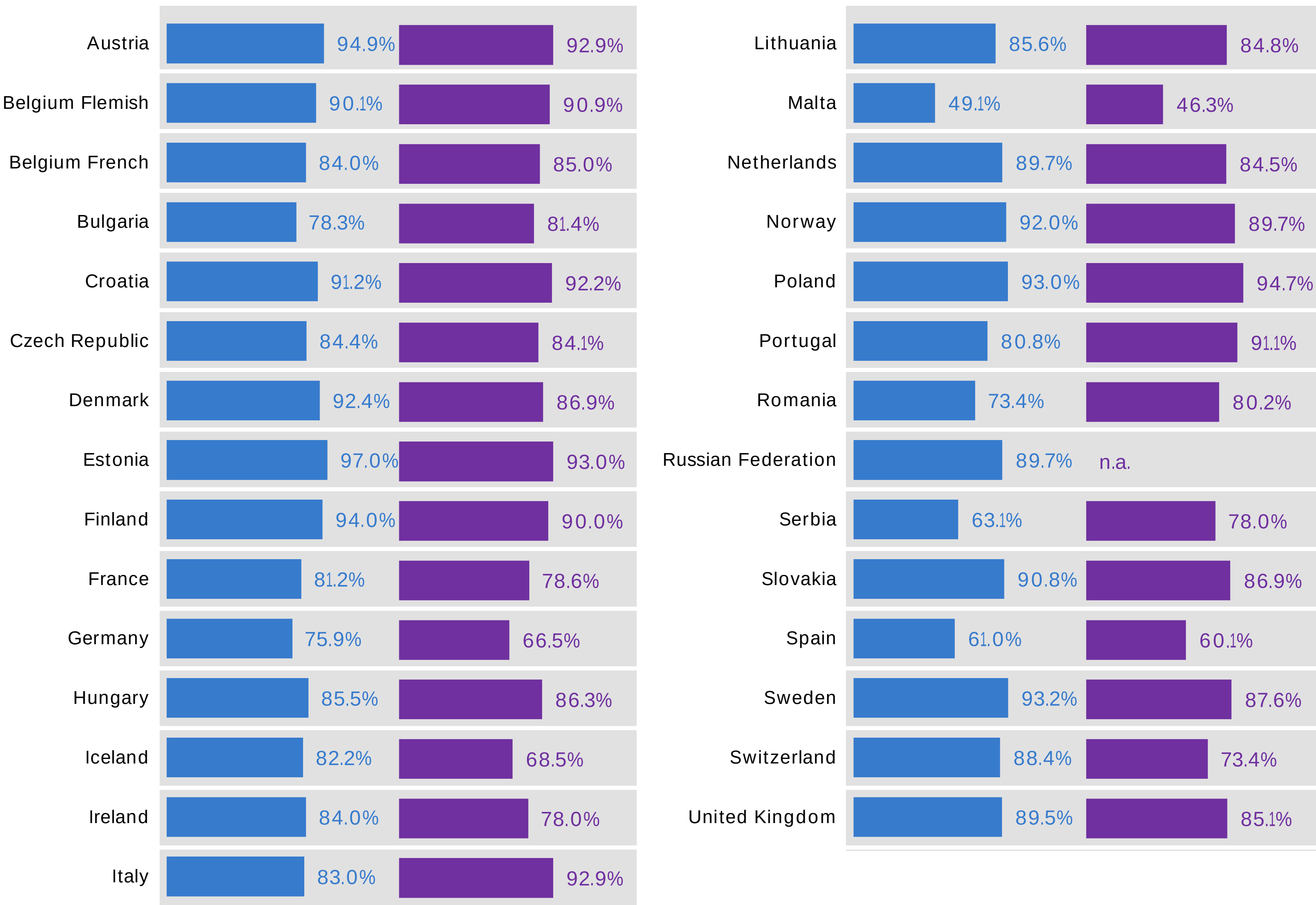


49.1% 46.3%

(n.a.) (n.a.)

Source: EBU based on Members' data. Note: reach definitions can vary among countries.

2014 RADIO WEEKLY REACH

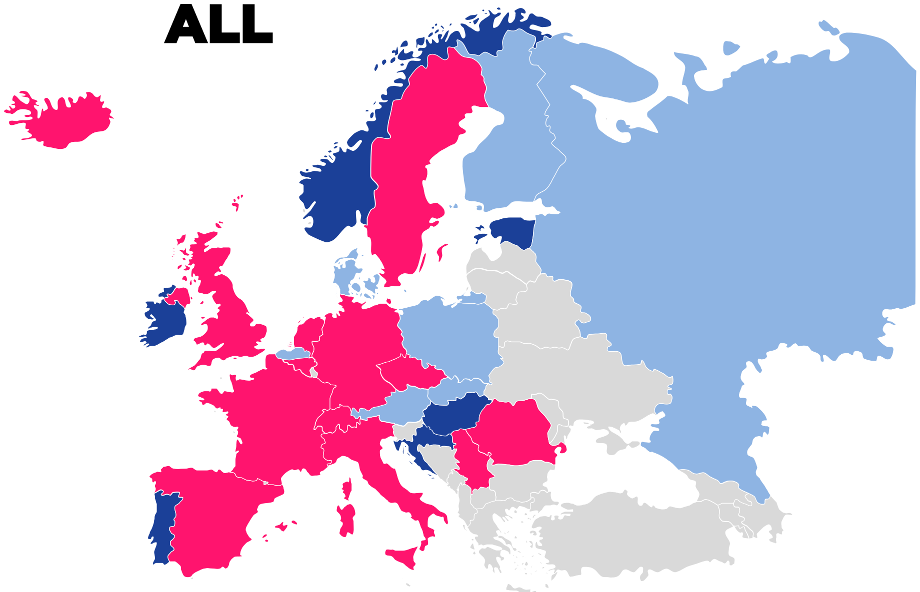


Source: EBU based on Members' data. Note: reach definitions can vary among countries.

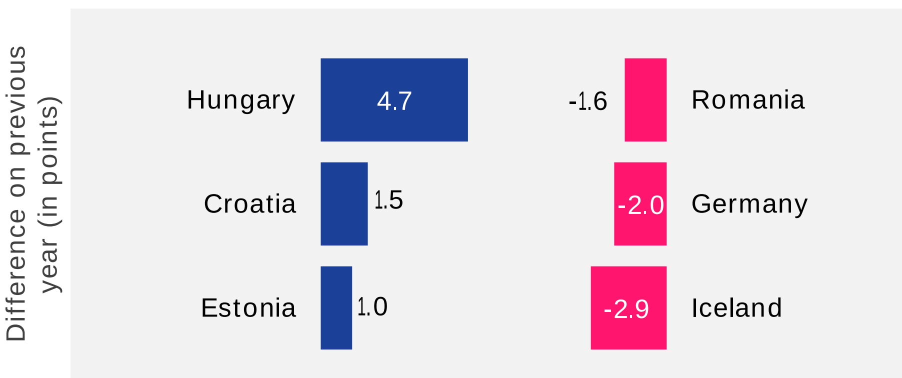
2014 RADIO WEEKLY REACH

Increase vs 2013
Level with 2013*
Decrease vs 2013
No evolution data

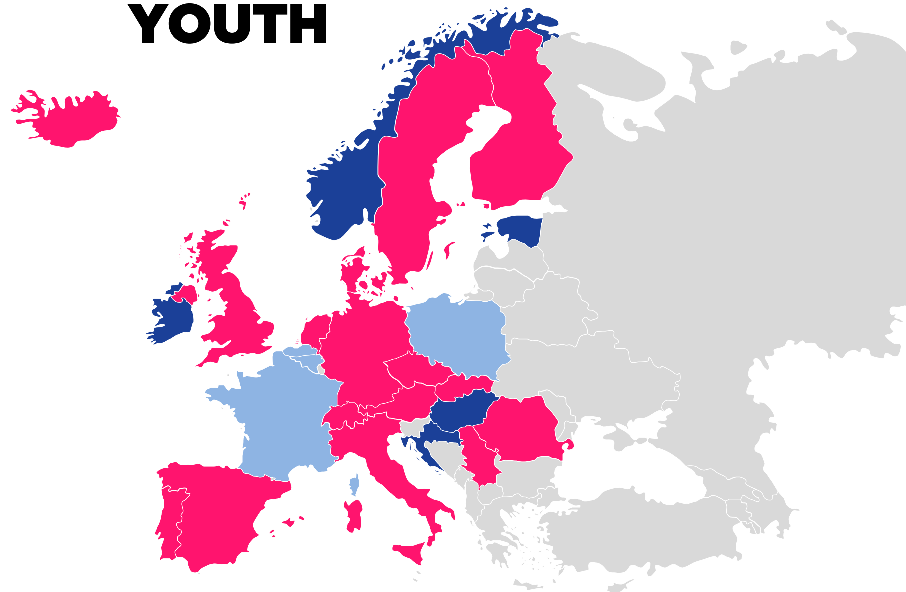
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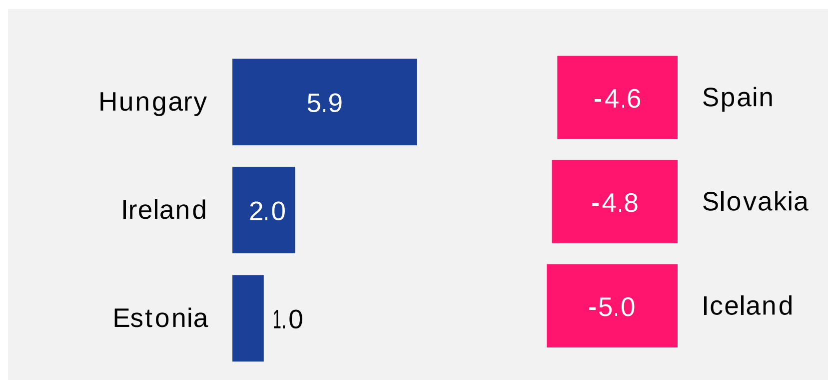
50% of markets saw a **DECREASE** of radio weekly reach in 2014



YOUTH

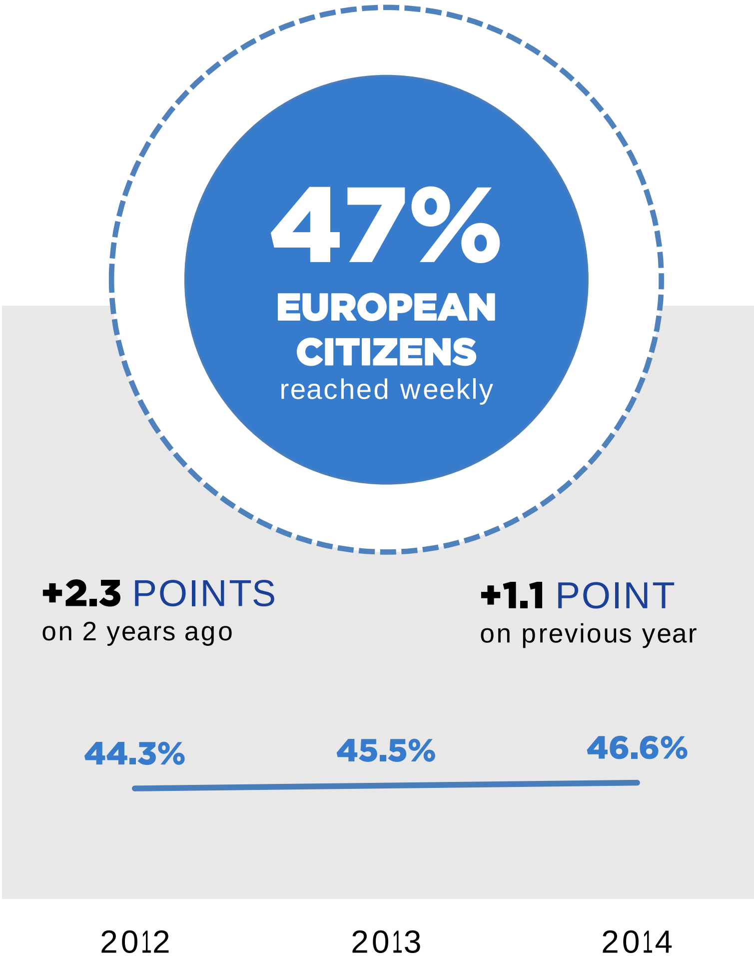


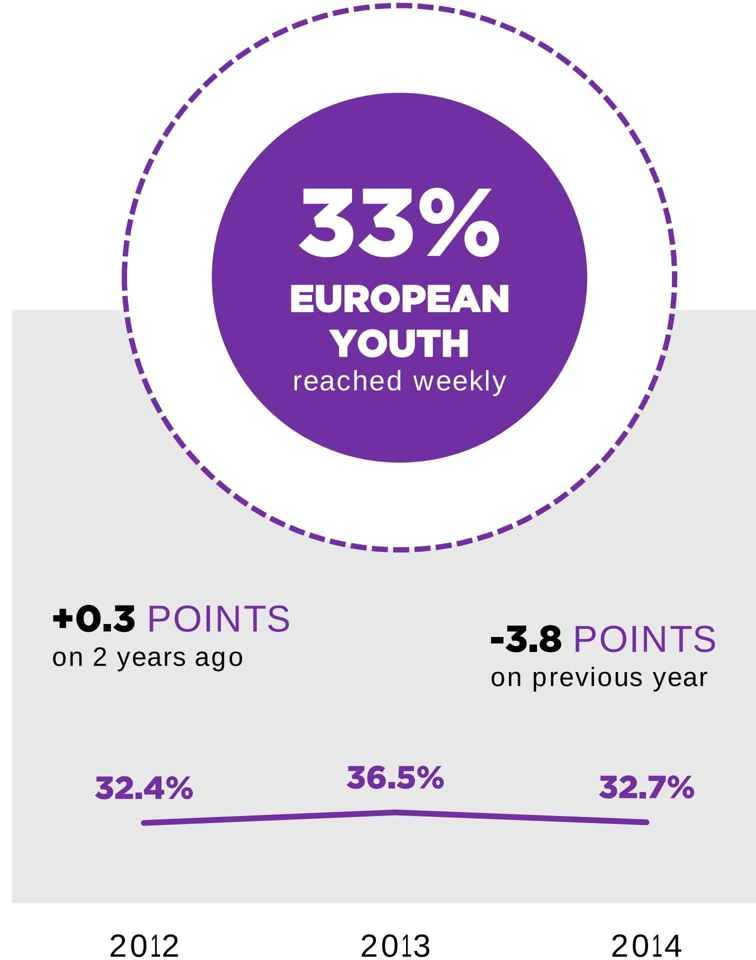
64% of markets saw a **DECREASE** of radio weekly reach among youth in 2014



Source: EBU based on Members' data. *Level with 2013 includes evolution between 0.4 and -0.4

PSM RADIO WEEKLY REACH IN 2014





Public service radio increased its reach although youth are still much harder to attract

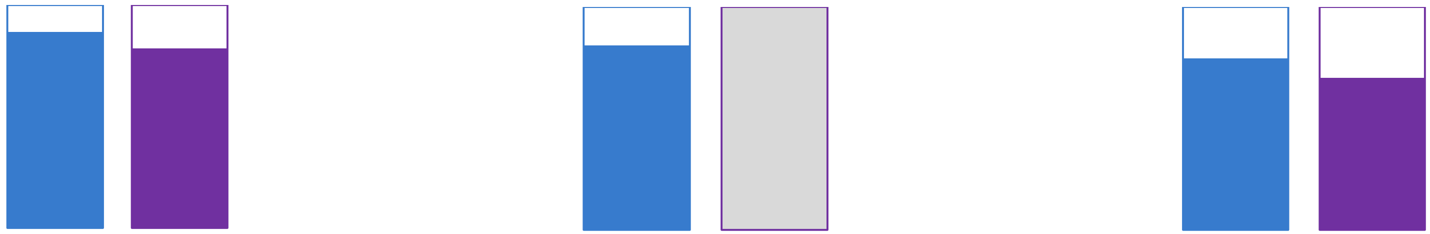
Source: EBU based on Members' data. 2014 average based on 28 EBU markets (also for youth). Number of markets may vary by year.

All | Youth

2014 weekly reach (in %)

( ) Difference on previous year (in points)

HIGH PSM RADIO WEEKLY REACH

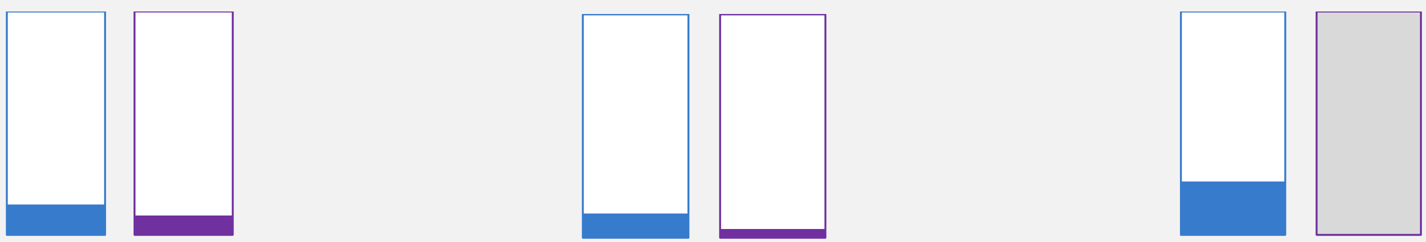


AUSTRIA: All 87.9% (-1.0) | Youth 80.6% (-3.2)

DENMARK: All 82.8% (-0.3) | Youth n.a.

NORWAY: All 76.9% (+2.7) | Youth 68.1% (+1.2)

LOW PSM RADIO WEEKLY REACH



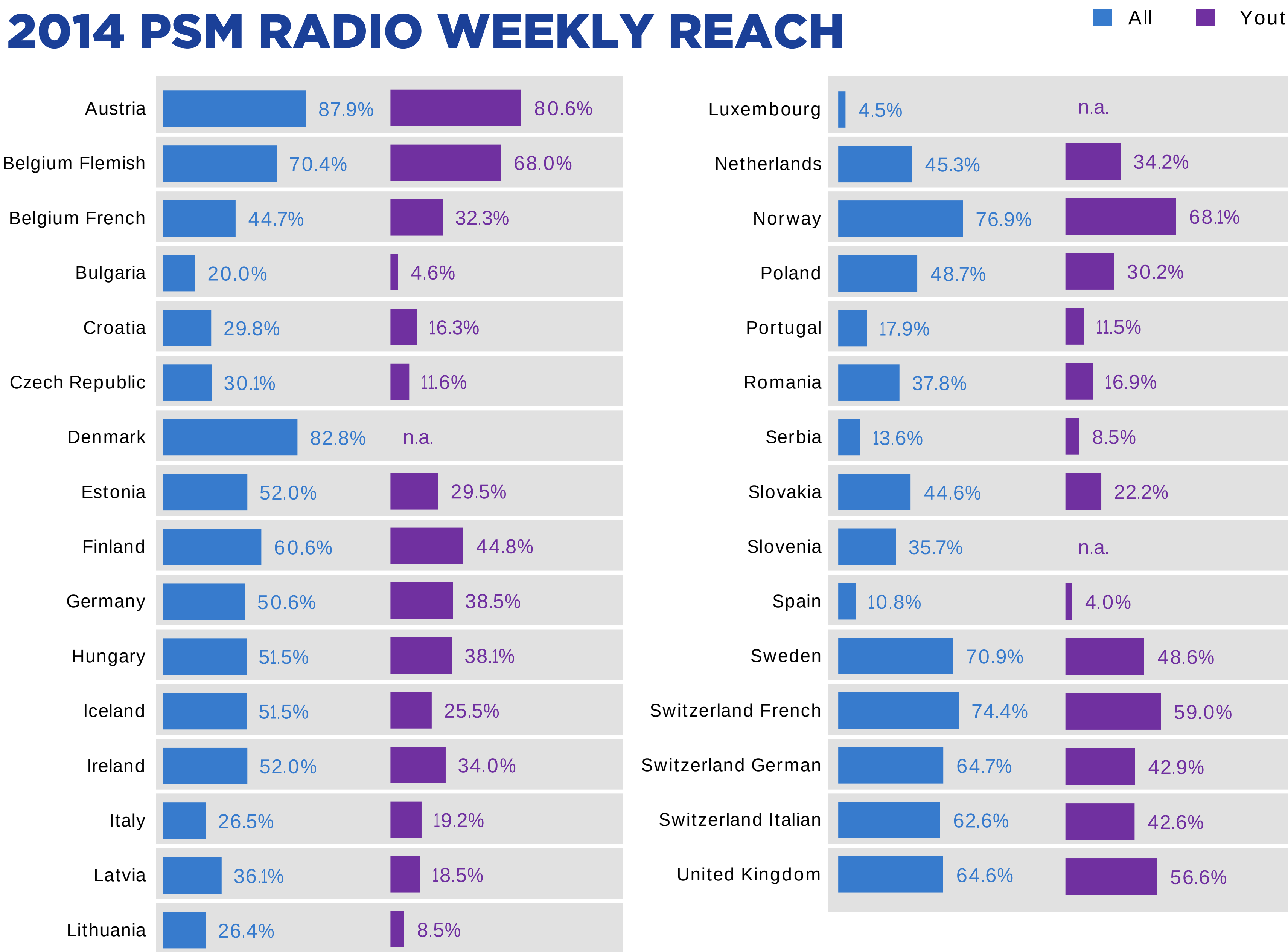
SERBIA: All 13.6% (n.a.) | Youth 8.5% (n.a.)

SPAIN: All 10.8% (-0.1) | Youth 4.0% (-0.2)

LUXEMBOURG: All 4.5% (+1.0) | Youth n.a.

Source: EBU based on Members' data. Note: reach definitions can vary among countries.

2014 PSM RADIO WEEKLY REACH

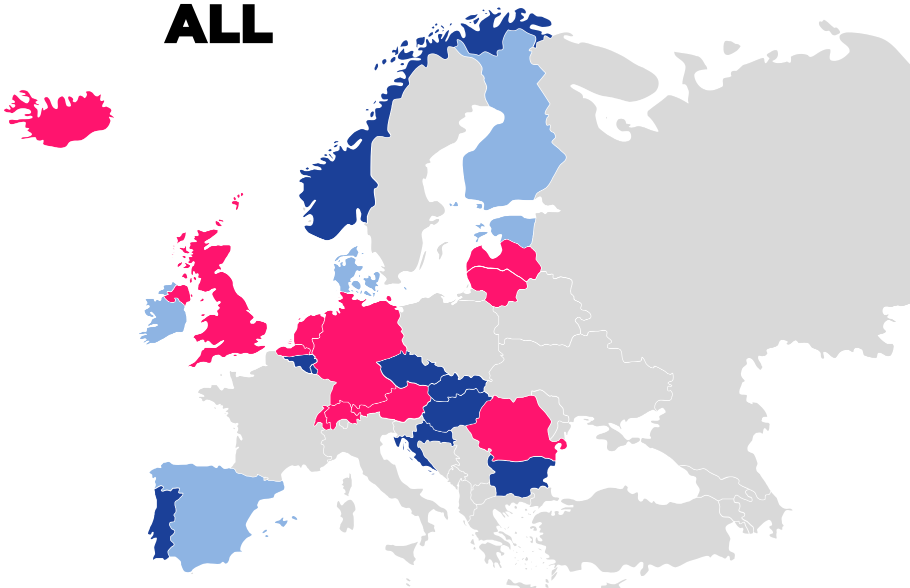


Source: EBU based on Members' data. Note: reach definitions can vary among countries.

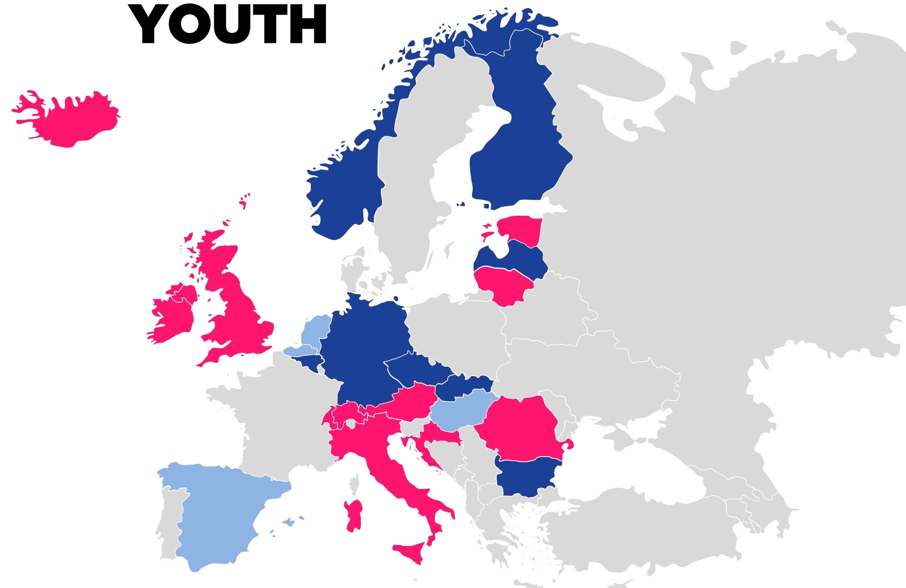
2014 PSM RADIO WEEKLY REACH

- Increase vs 2013
- Level with 2013*
- Decrease vs 2013
- No evolution data

ALL

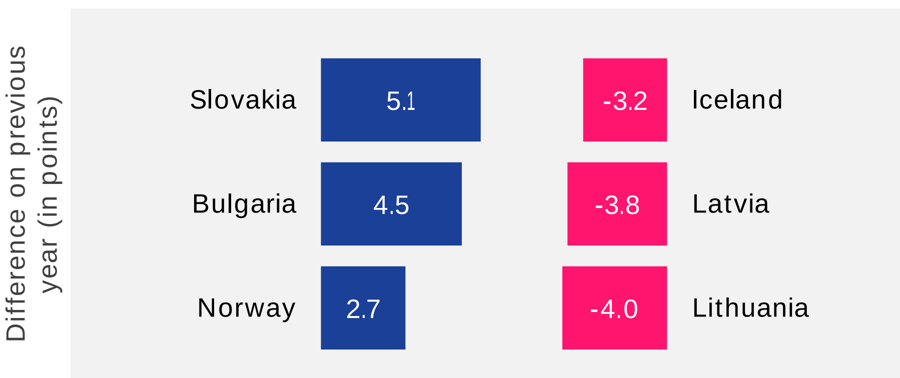


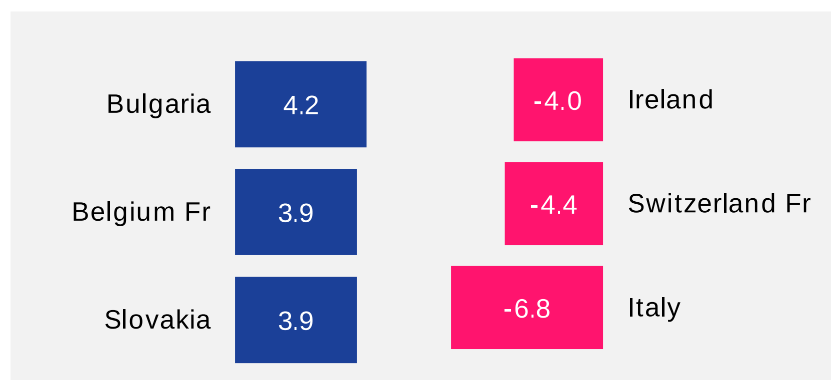
YOUTH



44% of markets saw a **DECREASE** in PSM radio weekly reach in 2014

48% of markets saw a **DECREASE** in PSM radio weekly reach among youth in 2014





Source: EBU based on Members' data. *Level with 2013 includes evolution between 0.4 and -0.4

SECTION 3
MARKET SHARE

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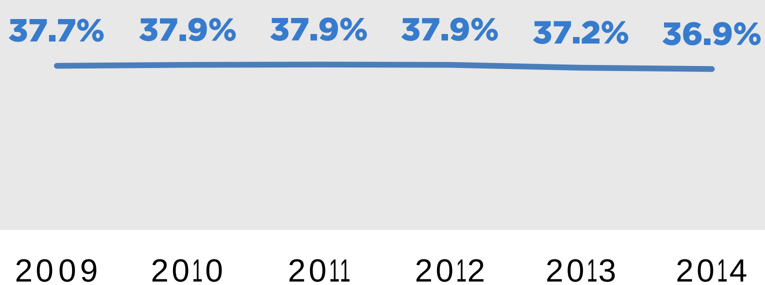
PSM RADIO MARKET SHARE IN 2014

In 2014 EBU PSM radio Members achieved an average **36.9%** MARKET SHARE among **EUROPEAN CITIZENS**

In 2014 EBU PSM radio Members achieved an average **22.1%** MARKET SHARE among **EUROPEAN YOUTH**

-0.8 POINTS
on 5 years ago

-0.3 POINTS
on previous year



Due to the changes in the sample, evolution data of market share among youth are not reliable. When keeping the same sample of countries, market share remained flat from 2013 to 2014.

Public service radio is losing market share at a very slow pace

Source: EBU based on Members' data. Note: 2014 average based on 33 EBU markets (30 for youth). Number of markets may vary by year.

All ■ Youth ■

2014 viewing share (in %)

( ) Difference on previous year (in points)

HIGH EBU PSM RADIO MARKET SHARE

SWEDEN

79.0% (-0.1) 54.1% (-1.7)

DENMARK

75.4% (-0.7) 56.3% (-2.4)

AUSTRIA

74.0% (=) 56.0% (=)

LOW EBU PSM RADIO MARKET SHARE

PORTUGAL

9.9% (-0.7) 4.1% (+0.3)

SERBIA

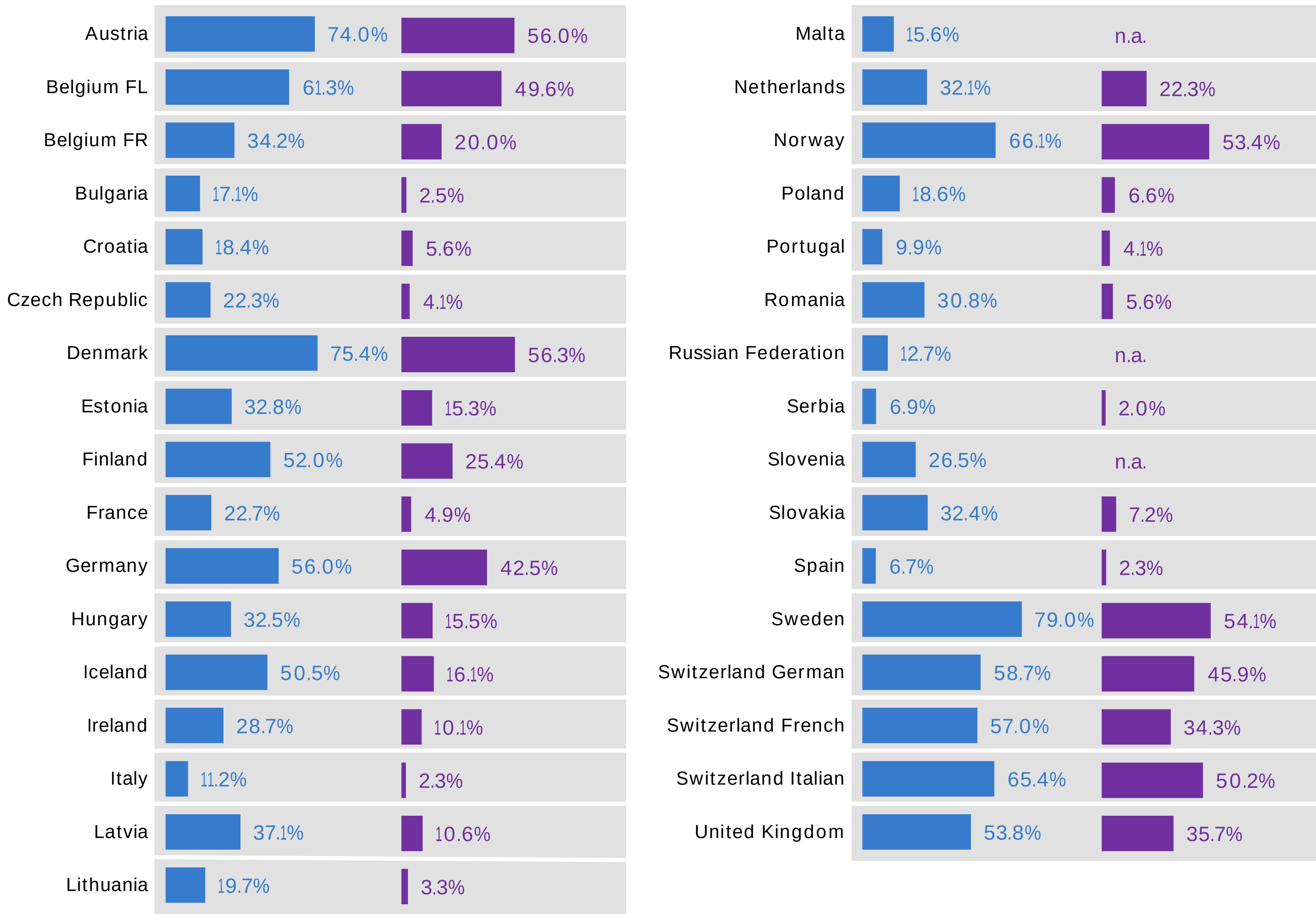
6.9% (=) 2.0% (-0.1)

SPAIN

6.7% (+0.6) 2.3% (+0.1)

Source: EBU based on Members' data.

2014 PSM RADIO MARKET SHARE

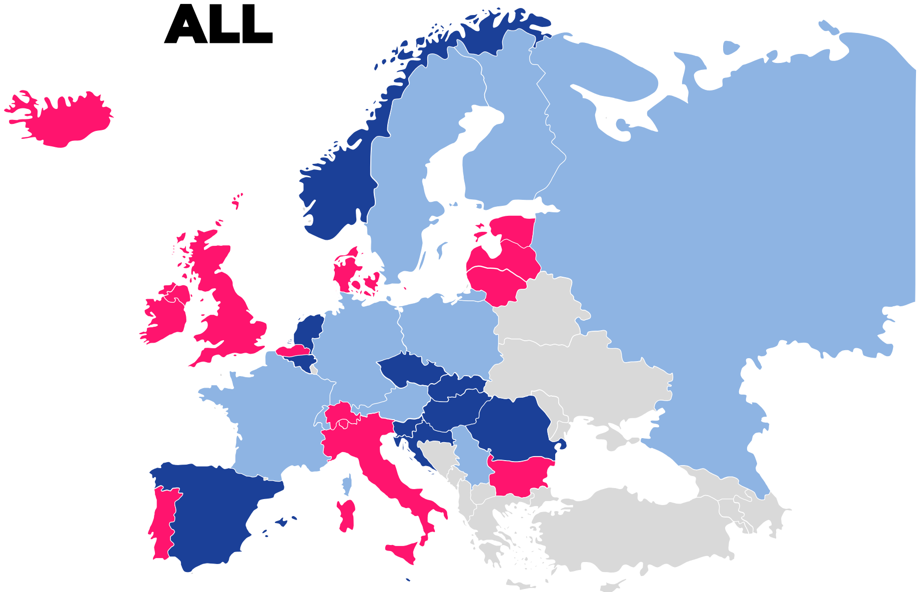


Source: EBU based on Members' data. Note: reach definitions can vary among countries.

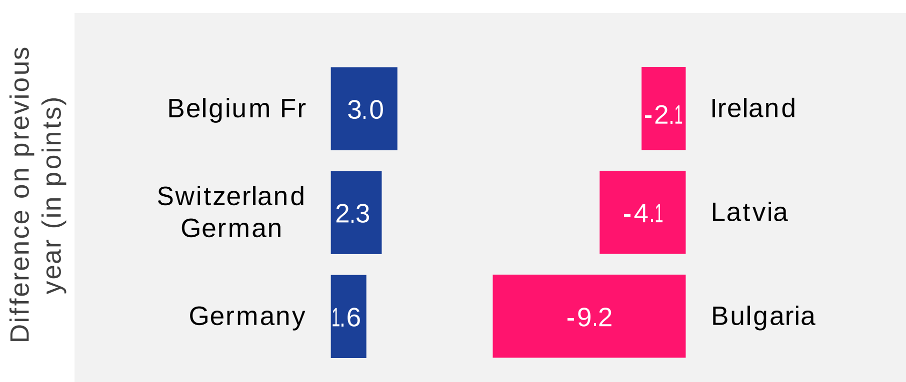
2014 PSM RADIO MARKET SHARE

- Increase vs 2013
- Level with 2013*
- Decrease vs 2013
- No evolution data

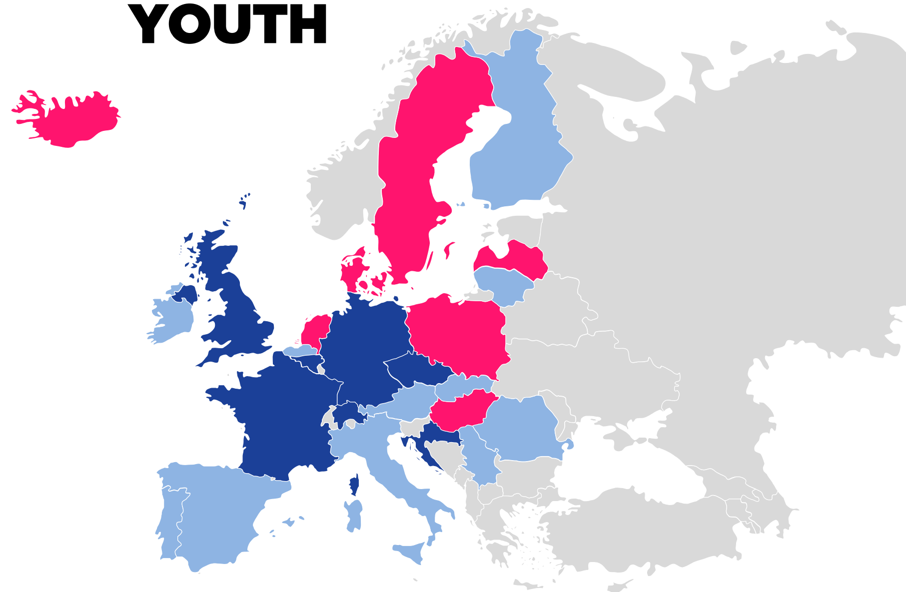
ALL



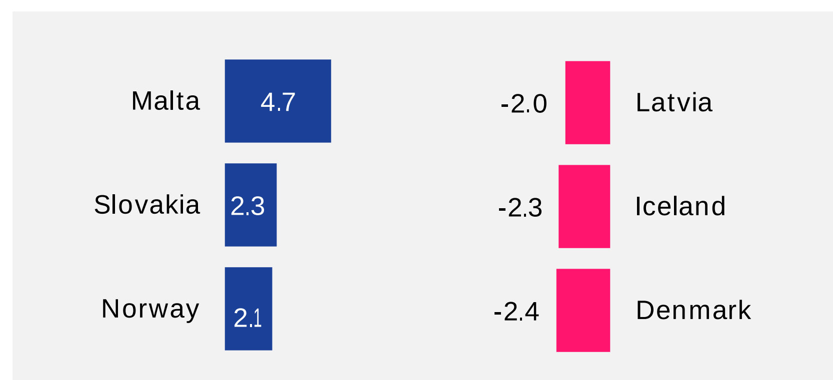
39% of EBU PSM Members saw an **INCREASE** of their market share in 2014



YOUTH



36% of EBU PSM Members saw an **INCREASE** of their market share in 2014



Source: EBU based on Members' data. *Level with 2013 includes evolution between 0.4 and -0.4

2014 KEY RADIO AUDIENCE TRENDS

- Daily listening time in the EBU Area remained stable on average versus 2013
  From 2013 to 2014, daily listening time decreased by just 1 minute to 2 hours 42 minutes
- In most markets, small declines in listening time persisted in 2014
  Listening time only increased in Hungary and Portugal

- More than 420 million individuals listened to radio in Europe every week
  This figure includes more than 40 million youth
- Weekly reach slightly declined to 84.0% of individuals
  Young adults weekly reach was very similar (82.5%)
- PSM radio maintained last year's positive trend in terms of reach
  The reach of PSM among youth is nearly 15 points lower than the reach for the whole population

- EBU public service radio achieved an average market share of 36.9%
  Among youth, this figure stands at 22.1%
- Although the average share slightly declined in 2014, more of the markets saw increases
  The evolution of share among EBU public radio is also quite flat in most of the markets

- Over the last 5 years the trends are a stable reach and a slightly declining listening time
  These trends are more acute among youth

MEDIA INTELLIGENCE SERVICE

This report was produced by the Media Intelligence Service (MIS) at the European Broadcasting Union.

For additional information or questions, please contact us at mis@ebu.ch / +41.22.717.22.97 or visit our Media Intelligence Portal http://www.ebu.ch/mis

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